

Planned Giving That You CAN Do!

Presenter/Moderator

- Kay Marquet, President, Kay Marquet Associates
Philanthropic & Consulting Services

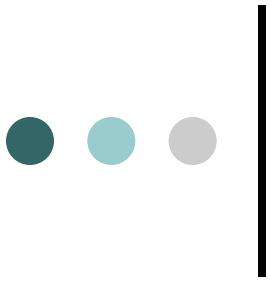
Panelist

- Brad DeMeo, Attorney, DeMeo, DeMeo & West

Panelist

- J Mullineaux, Vice President for Development,
Community Foundation Sonoma County

Volunteer Center Conference • Friday, March 26, 2010

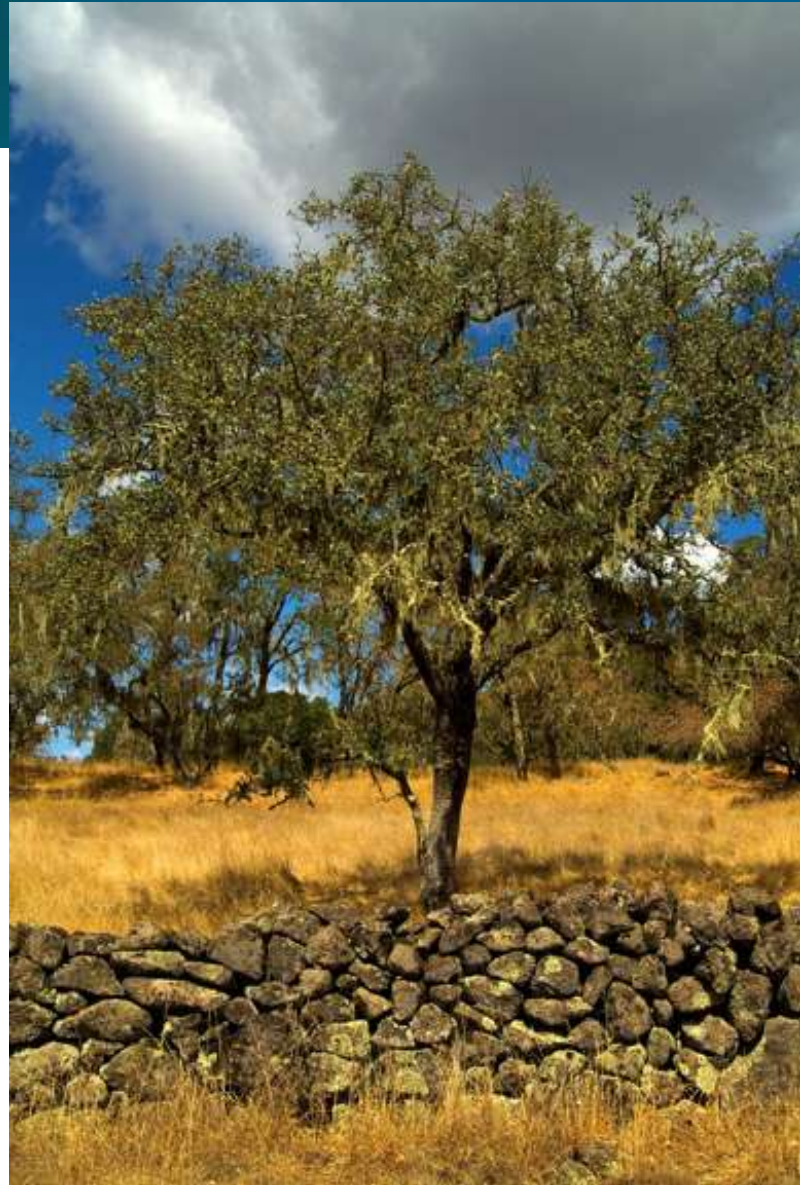


\$100,000

Planned Giving That You CAN Do

J Mullineaux

March 26, 2010



2008 CHARITABLE GIVING

\$307.65 Billion

- Individuals \$229.28 Billion 75 percent
- Bequests \$ 22.66 Billion 7 percent
- Foundations \$ 41.21 Billion 13 percent
- Corporations \$ 14.50 Billion 5 percent

Source: Giving USA

Two recent studies:

Russell N. James III, University of Georgia

Adrian Sargeant, Robert Hartook, Jen Shang, Indiana University

- 56 percent had a Will
- 15 percent had named a charity in their Will
- Circumstances change throughout a person's lifetime which will change an estate plan
 - Grandchildren
 - Health
 - A spouse's death

Studies available at www.legacyleaders.ca/research

- A Definition of Planned Giving
- B Readiness
 - Institutional readiness – donor base
 - Board commitment – champion, development committee
 - Organization – staff, business office
 - Individual – understanding
 - Policies and budget/workplan
 - Stewardship – recognition, events
 - Reality check – planned giving will take *some* time
 - Success – you will receive planned gifts

- **Integrate plan into current or new activities**
 - **Mailings – letters, buckslips, postcards**
 - **Newsletters – testimonials**
 - **Remit envelopes – check box**
 - **Donor survey**
 - **Website – contact information**
 - **Events/seminars**
 - **Brochures – own or canned; year-end planning**
 - **Stelter**
 - **Newkirk**
 - **Sharpe**

- Identify prospects
 - Board Members
 - Former Board Members and Founders
 - Volunteers
 - Members and Donors
 - Clients
 - Broader Community
 - Families of the Deceased
- Make contact with most likely prospects
 - Personal visits are the best!
 - Correspondence – 73% still prefer mail
 - Tours, open houses
 - Telephone periodically

- **Technical Support**
- **Network of Friends**
 - **Colleagues**
 - **Professionals – attorneys, CPAs, CFPs**
 - **Planned gift consultants**
 - www.plannedgivingcoach.com
 - www.plannedgiving.com/resources (free downloads)
 - www.redwoodempirereepc.org
 - **Community Foundation Sonoma County**
www.sonomacf.org

- **Recognition Society**
 - The Grace McCann Morley Society
 - The Avery Brundage Society
- **Thank you gift/Acknowledgement**
 - Plaque, website, annual report
- **Meetings**
 - ED/CEO, DoD, Program Director, Board person



Building, Preserving and Celebrating Community Assets